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ABSTRACT

This topical outline was developed by the directors of the various Simu-School projects. It contains the following main headings: An Introduction to Comprehensive Educational Planning, Preparation for Planning, The Planning Process, Implementation, Activities Related to the Planning Process, Functions and Needs That Permeate the Planning Process, Components of the Comprehensive Educational Plan, Planning Techniques, and Annotated Bibliography. (Author/IRT)

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# A GUIDE FOR COMPREHENSIVE EDUCATIONAL PLANNING - A TOPICAL OUTLINE

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Prepared for

PROJECT SIMU-SCHOOL

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## A Guide for Comprehensive Educational Planning - A Topical Outline*

I. An Introduction to Comprehensive Educational Planning

A. Prelude to comprehensive educational planning

1. Historical antecedents leading to modern educational planning

2. Planning as it exists today versus what planning ought to be

B. A definition of comprehensive educational planning

1. Relationship to other kinds of planning such as: comprehensive planning, city and regional planning, management planning

2. Relationship of planning to administration/management

3. Three levels of comprehensive educational planning - Strategic (SEA), Tactical (LEA), and Operational (building or operating program level)

4. The varying time frames for planning - (short-range, medium range, and long-range)

5. Distinguishing characteristics of comprehensive educational planning - (flexibility, catalystic aspect, scope, breadth)

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*This topical outline was developed by the directors of the various Simu-School projects. It was developed on January 17 and 18, 1974 at Ohio State University.

C. The "Why" of comprehensive educational planning

1. Need for planning
2. Values gained from planning
3. Products and outcomes of planning

D. Limitations - (What comprehensive educational planning should not be expected to do?)

E. The "Who" of planning

1. Comprehensive educational planning staff and their role
2. Community involvement
3. Legal decision makers
4. School district staff
5. Students
6. Experts outside education - (This would include representatives from the other social and governmental agencies impinging upon comprehensive educational planning at the local level.)

II. Preparation for Planning - (This could be considered the first step in the planning process. It is separated from the planning process since it is in many ways preliminary. All of the following should be accomplished prior to beginning the process of planning.)

A. Parameters of "The Comprehensive Educational Plan" - (These should be established prior to beginning the planning process for any plan. In many cases, they will be "givens" presented to the planner. In other cases, it may be necessary for the planner to investigate and establish these.)

A. (Continued)

1. Scope of the plan
2. Time frame related to the plan
3. Depth or specificity to be achieved in the plan

B. Analysis of resources available for planning

1. Human resources
2. Financial resources
3. Time resources

C. Creating the planning organization

1. Staff
2. Placing the planning function within the school system - (This should include establishment of appropriate communication channels.)

D. Preparing a structure for planning - (This actually involves network analysis.)

1. Identification of major tasks to be accomplished
   a. Breaking of tasks into manageable components
   b. Complete definition of each component
2. Assessing of tasks and selecting techniques
3. Assigning resources to each task
4. Assigning a time frame to each task
5. Assigning of responsibility for each task

E. The end product of "Preparation for Planning" - (At the conclusion of this activity, the planning staff should have a specific plan to be followed in the process of planning. This plan should include the tasks to be achieved, resources to be utilized, responsibilities to be assumed by each member of the staff, deadlines to be met, and a definition of the end product to be produced.)

III. The Planning Process - (The following topics are presented in a somewhat sequential order although the process by its very nature will allow deviation from the sequence listed.)

A. Goal development

1. Definition of a goal - (Goals are broad direction setters and are not expected to be achieved.)

a. Relevance of goals

b. Applicability of goals

c. Goals as compared to values

2. Identification of goals

3. Prioritizing of goals

4. Assessing the level of goal achievement

B. Objectives development - (Objectives are more specific than goals, measurable, directly related to goals, and connect a goal to a specific program.)

1. Definition of objectives

a. Goals as compared to objectives

b. Achievability of objectives

c. Time as related to objectives

B. (Continued)

2. Delineating objectives

3. Prioritizing objectives

4. Establishing the criteria for measurement of objectives achievement

5. Assessing the level of objectives achievement

C. Development and synthesis of curriculum and instruction plans - (It should be pointed out that in the planning process it is important to first develop and synthesize the plan for learning. Once this plan is developed, it is possible to move on to support system plans. A basic assumption is that schools are created for the purpose of learning and all other activities occurring in the school system can be viewed as a support system. Based upon this assumption, the curriculum and instruction plan is first developed and then the support system plans are detailed.)

1. Definition of an alternative

2. Explanation of the hierarchical relationship between alternative curriculum and instruction plans, objectives, and goals

3. Dependence of the support system plans upon the curriculum and instruction plan

4. Identifying alternative plans

5. Analyzing alternative plans

6. Synthesis/selection of a plan

D. Development and synthesis of alternative support system plans - (The support system plans include the following.)

1. Relationship of support system plans to the curriculum and instruction plan
2. Identification of alternative support system plans
3. Analyzing of alternative support system plans
4. Synthesis/selection of alternative support system plans

E. Convergence of the comprehensive educational plan and development of the strategy for implementation

1. Achieving an integrated comprehensive educational plan
2. Developing an overall strategy for implementing the comprehensive educational plan

IV. Implementation - (This is an operational activity rather than a planning activity. At the same time, however, implementation is essential if planning is to be meaningful and therefore should be discussed at this point.)

A. Responsibility for implementation

B. Planner's role in supporting implementation

V. Activities Related to the Planning Process

A. Evaluating the comprehensive educational plan

B. Modifying the plan

C. Recycling - (Recycling refers to re-entering the process. At any point during the process it may become necessary to return to the beginning or to some previous step as a result of the introduction of new data.)

VI. Functions and Needs that Permeate the Planning Process

A. Data and information

1. Definition of data - (This includes an explanation of the kinds of data, the difference between data and information, and a review of possible uses of data.)
2. The need for a systems approach to data
3. Validation of data ("Crap detector" - Steinbeck)
4. Levels of data
5. The base data system
6. Data trees

B. Involvement and participation in planning

1. Definition of involvement and participation
   a. Involvement is the essence of planning
   b. Involvement must be on a differential basis
2. Role of the community in planning
3. Role of students in planning
4. Role of the staff in planning
5. Role of the board of education in planning
6. Involvement of other social agencies and governmental bodies in planning

C. Evaluation of the planning process - (Evaluation of planning should be continuous from the beginning of the process through completion of the plan.)

D. Non-linear aspect of the planning process - (Planning cannot be viewed as a linear series of events always occurring in a repetitive cycle. While the process of planning as outlined represents a generalized sequence typical to planning, it is actually more interactive. One step in the process functions in an interactive way with other steps.)

VII. Components of the Comprehensive Educational Plan

A. Introduction to the contents of a comprehensive educational plan

1. Writing style
2. Considerations as to possible audiences
3. Style of publication
4. Use to be made of the comprehensive educational plan

B. The curriculum and instruction plan - (This is the key component of the comprehensive educational plan. This aspect of the plan must be finalized somewhat before the other areas or components can be properly addressed. In this component of the plan, the following topics are typically addressed: overall philosophy of learning, role of the teacher, the organization for learning, learning styles to be addressed, content to be emphasized, and students to be accommodated in the school system.)

C. Support system plans - (The following plans have one thing in common. They are all designed to support the implementation of the plan just described.)

1. Staff personnel plan - (This plan typically will address the following topics: the number of staff members required, the specific roles to be demanded of staff, the estimated costs of the staffing described, the approaches to be taken in the acquisition of staff, the techniques or procedures to be used in the evaluation of staff, the in-service and/or pre-service to be emphasized with staff, and the induction of new staff.)

2. Logistics plan - (This part of the plan would include transportation, food service, maintenance and custodial services, and data system maintenance.)

3. External relations plan - (This component of the plan relates the learning process to the other social agencies and governmental bodies operating in the locale. Typically, it would relate the school system to agencies such as: city or regional planning, hospital planning, recreation and parks department, higher education, non-public education, and local economic planning. This aspect of the plan may also address the task of conveying to the general public the general status of the school system.).

4. Facilities plan - (This component of the plan would describe the sites and the facilities needed to house the curriculum and instruction plan.

5. Organizational plan - (This aspect of the plan includes those decisions and intents regarding the organization of the school system and of the staff. Included may be plans for inter-staff communication.)

6. Financial plan - (The available resources and how they will be allocated should be outlined.)

VIII. Planning Techniques

A. Definition and introduction to the concept of planning techniques

B. Matrix - (See Figure 1. This matrix will attempt to relate available planning techniques to the planning process as outlined above.)

C. Outlining of individual techniques - (For each technique, the following items should be identified if applicable.)

1. The relevance to specific steps in the process of planning

2. Definition and explanation of the technique

3. Outcomes and possible uses of the technique

4. Costs associated with the technique

5. Time typically consumed in using the technique

6. Limitations often associated with the technique

7. Simu-school documents that discuss the technique

8. Additional references

FIGURE 1 - RELATIONSHIP OF PLANNING TECHNIQUES

TO THE PLANNING PROCESS

| Techniques | Elements of the Planning Process | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Preparation for Planning | Goal Development | Objectives Development | Curriculum/Instruction Plan Development | Support System Plan Development | Evaluating the Plan | Modifying the Plan | Recycling | Data System | Involvement in Planning | Evaluating the Planning Process |
| 1. | | | | | | | | | | | |
| 2. | | | | | | | | | | | |
| 3. | | | | | | | | | | | |
| 4. | | | | | | | | | | | |
| 5. | | | | | | | | | | | |
| 6. | | | | | | | | | | | |
| 7. | | | | | | | | | | | |
| 8. | | | | | | | | | | | |
| 9. | | | | | | | | | | | |
| 10. | | | | | | | | | | | |

## Possible Techniques

A. Advocate Team Process

B. Convergent Team Process

C. Charette

D. Network Analysis

E. Brainstorming

F. Delphi

G. Phi Delta Kappa Goal Analysis

H. SPLCS Goal Analysis

I. PPBS

J. Simulation

K. ARIOLE

L. Input/Output Analysis

M. Enrollment Projection

N. Saturation Analysis

IX. Annotated Bibliography - (The bibliography shall include the title and reference material for each entry and a paragraph or two describing the citation. The entries should be arranged by topic. The topics should be associated with the guide outline.)